Cross-Training Overview

Cross-training is an intentional and strategic sharing of knowledge and resources across separate service systems in order to improve collaboration and coordination for the benefit of families served in the community. Because children and families with complex needs often require services and support from multiple systems that don't often communicate or learn about each other, families can experience duplication of services, gaps in services, or simply be overwhelmed by the number of supports in their lives.

Cross-training is a strategy that can ensure that providers from disparate systems have the opportunity to better understand what services each provides and how those services fit together to best support the families they work with. It also provides a forum for providers that don't typically interact the opportunity to develop professional working relationships, which is essential for coordination and alignment of services for families. Cross-training also provides some dedicated time and space for providers to connect and engage in collective planning.

The structure of cross-training can vary depending on the needs and resources of a community, but in general, cross-training should include some essential components:

- Basic overviews of how each system involved works—a description of the services, who is eligible, how to make referrals, etc.
- Opportunities for cross-system problem solving and networking—small group discussions, resource fairs, etc.
- Opportunities to identify community-level planning needs for ensuring families receive services—referrals, data sharing, co-case management, etc.

Planning a cross-training

Cross-training should be planned collaboratively across systems. A planning team should be convened with representatives from the various systems that will be part of the cross-training. Planning team representatives should be knowledgeable about their system, including being familiar with challenges and needs of direct service staff. Planning team representatives should also have the time to participate in planning meetings or phone calls as well as the support of their agency and system leadership. Ideally, communities should leverage existing coalitions to house the work of planning the training.

The time it takes to plan a cross-training can vary considerably depending on a number of factors, including availability of training space, schedules of planning team members, and whether the planning team represents a new or ongoing collaboration. In general, planning teams should budget approximately six months from their first meeting to execution of the cross-training.

Selecting a date and location for the training should be the first task for the planning team. Once this information is set, it is easier to address the other details and logistics. Planning teams should consider locations that are central, minimize travel for attendees, and are easy to access (parking available, close to public transit, etc.). When selecting a date, planning teams should consider other events that may conflict with the cross-training, impact of weather on travel, and time of year and week (e.g. the Friday before a long holiday weekend may conflict with vacation plans and lead to low turnout).

Target audience

Include staff from multiple levels in the cross-training—front line, supervisors, and administrators should all attend to ensure everyone hears the same message.

Content of training and presenters

It is best to keep the basic system education high-level. The presentation should not be "in the weeds" or program-specific, but more of a "sales pitch" for the system. The training should also include a hands-on activity for attendees to practice or apply what they've learned, such as small group discussions around a scenario. Planning teams should also consider including a structured or supported activity that promotes cross-system interaction. Although informal networking sessions can be useful, generally speaking, people tend to stick close to those they came with. A structured or supported activity encourages attendees to interact with people they don't know and may be more comfortable for attendees who are more introverted or newer to the field.

The quality of presenters is critical to the success of a cross-training. Ideally, presenters should be leaders or providers from the systems participating in the cross-training so they can speak to not only the high-level summary of the system but also to any local variation in how services are delivered. Presenters should also be good ambassadors for their system, sharing the information in a way that is accessible and engaging. Planning teams should consider providing an honorarium and/or travel reimbursement for presenters as a way to both thank them for their time and effort and to ensure a high-quality presentation.

Continuing education credits

Obtaining and managing continuing education credits for a cross-system audience can be time-consuming and challenging. Planning teams should start the process of applying for relevant credits as early as possible and should consider all possible attendees and the continuing education credits most relevant to their practice. Ideally, planning team member organizations should take on obtaining credits for their respective systems.

Marketing and registration

Part of planning the cross-training should include a plan for marketing the training and collecting registration. Once a date and location is selected, planning teams may choose to distribute a "save the date" to announce the event ahead of opening registration. Generally speaking, distributing fliers via email distribution lists or newsletters is effective in reaching the training audience. It is recommended that registration be collected via an online tool, such as SurveyMonkey or Eventbrite. When collecting registration, planning teams should consider including questions beyond those typically asked, such as identifying the registrant's primary service system, the geographic locations served by the registrant, role within the organization (not title—direct worker, supervisor, administrator, etc.). Such information can be useful to the planning team to not only get a sense of who is attending but also to inform the structure of activities, such as assigning small groups.

Cross-training costs

Cross-training costs can vary considerably. The biggest costs (besides time and travel for planning team members and attendees) include training space rental and food. Some strategies for managing costs associated with space and travel include partnering with institutions with training facilities, such as higher education institutions and state agencies, and scheduling the cross-training as part of or adjacent to other existing events, such as conferences and meetings. Planning team member organizations may be able to provide in-kind resources, such as copies of handouts and lending computers and projectors. Additionally, organizations with training budgets could consider pooling resources and providing joint training in the form of cross-training. Planning teams can also consider soliciting local businesses for donations of food/refreshments or approaching community foundations to support the training. Although it is ideal to provide food, it isn't absolutely necessary, so planning teams can also consider holding the cross-training in a location where attendees can easily purchase lunch or explore creative scheduling options, such as splitting the event into two half-days.

Evaluation and training implications

Planning teams should include a process for evaluating the effectiveness of the cross-training. This could include strategies that point to impact, such as pre- and post-tests of knowledge or follow-up surveys to attendees that ask about how they've used the information they learned or continued relationships with other attendees. Evaluation can and should also include more traditional approaches that gather feedback from attendees about their perceptions of the presentations, presenters, logistics, etc. It is recommended that cross-training be repeated regularly to keep up with both changes to programs and services in the community as well as staff turnover. Information gathered in evaluations can inform planning of future cross-trainings.

Part of the evaluation process should also include some debrief and reflection among the planning team members themselves. It is often helpful to schedule a meeting after the training has occurred to review attendee evaluations, talk through and document challenges and successes, make plans to take action on any identified next steps from the training or on any follow-up needed with attendees, and discuss planning for the next training.

Community-based cross-training also presents an important opportunity to identify system/policy challenges and solutions. Incorporating activities that allow cross-training attendees to talk about their challenges working together and serving families, as well as their ideas for changes, provide valuable insight into how policies and funding could be shifted to better support collaboration and improved services on the ground. Planning teams should elevate policy and system implications identified through cross-training to system leaders, policy makers, and advisory bodies.

For more information about cross-training, contact Carie Bires at cbires@theounce.org.